



**FULLCIRCLE**  
FINANCIAL

## Spring Forward

Hello Rebecca,

Did you remember to set your clocks forward? While Daylight Savings Time might have cost us an hour of sleep, it also signals the arrival of spring and an opportunity to refresh your financial outlook.

Now is the perfect time to spring clean your finances! Consider adding these three items to your financial to-do list: 1. Review and update your budget to reflect any changes in income or expenses. 2. Check your credit report for any errors or fraudulent activity. 3. Evaluate your investment portfolio to ensure it aligns with your financial goals and risk tolerance. Let's make the most of this springtime momentum and set ourselves up for financial success!

Read more about how Daylight Savings Time can inspire your financial spring cleaning in the articles below. Don't forget to share them with friends and family who could also benefit from a financial refresh!



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*Thoughtful Wealth Management Starts with a Conversation*

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## Spring forward with this 10-minute financial makeover plan

March 7, 2024



Choose 3 goals and make them SMART: specific, measurable, achievable, realistic and time-bound.

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## How investors get risk wrong

March 11, 2024



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When the clocks spring forward, a bit of financial spring cleaning is in order. Periodically...

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